SYSTEM: Ombudsman Case Tracking System 2.0
SCRIPT NAME: User Acceptance Test Script
TEST 6: **Using a Script**

Scope:

The OCTS 2.0 application provides the SFA Ombudsman the ability to record information gained during contacts with customers, partners and third parties for the purpose of resolving request for assistance from customer. An important feature of OCTS 2.0 is scripting. An Intake Script has been written to guide users through the call intake process. The script prompts the user to ask certain questions and record all required information from the caller. This test case validates the tasks associated with opening a new case or working an existing case as a result of call intake activity using the Intake Script. The following contact scenarios will be executed:

- Open a new case for a new customer, not able to resolve issue
- Open a new case for a new customer, able to resolve issue
- Open a new case for a new customer based on information from third party contact
- Status or demographic update for existing customer with an existing case
- Open a new case for an existing customer – borrower calls
- Open a new case for an existing customer – third party calls

The information captured during interactions with contacts and subsequently entered into OCTS 2.0 will be determined by the type of Scenario encountered. For example, If this is the first contact with a customer, partner, or third party, contact information must be collected, the data necessary to create a new account may will be collected.

Testing for this OCTS Activity will involve staging two types of contact.

- Customer Contact
- Third Party Contact

These contacts will be associated with an appropriate account. A case will be generated for the customer contacts, and partner contacts will be associated with the customer case.

The result of this scenario's successful completion will be a creation of Contact Record, Account Record, and Case Record.

Exclusions/
Limitations:

- SIT/UAT does not have the capability of performing a stress test on the OCTS 2.0 program. The number of transactions staged for SIT/UAT conditions will represent only a small fraction of the production-size data.

Control:

Testing Site: Testing will take place at the ROB-3 site. The On-site Test Lead will:

- facilitate the test execution,
- collect change requests from the Users executing the test,
- enter the change control requests in to the MS Access System Investigation Request Tool,
- assign a priority level to each request,
- coordinate modifications with the development team,
- and coordinate regression testing with the User Test Team.

Conditions:

- Open a new case for a new customer, not able to resolve issue
- Open a new case for a new customer, able to resolve issue
- Open a new case for a new customer based on information from third party contact
- Status or demographic update for existing customer with an existing case
- Open a new case for an existing customer – borrower calls
- Open a new case for an existing customer – third party calls

Operations:

Input data will be staged using a Microsoft Excel Tool. After logging on to the Siebel test region, the tester will manually enter the staged data utilizing the following methods:

- The tester will navigate through the OCTS 2.0 screens in order to enter the data in the appropriate areas.
- The tester will utilize the SmartScript Business Component in order to enter data.

Results:

The test team will review results on-line.

Inputs:

The following excel files contain the test data:

Outputs:

The output will be stored in the Test Database.

Special Testing Instructions:

1. While using SmartScripts, you can hit Enter to skip questions and leave the field blank if the questions do not apply or if the information is not provided.

2. Ignore the question numbers listed before the question text. They are placed there as a reference in case any question text is changed.

Opening a New Case for a New Customer – Not Able to Resolve the Issue

Procedures/Script:

Scenario 1: Opening a New Case for a New Customer – Not Able to Resolve the Issue

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	1	Logon to OCTS 2.0 using proper ID and password.	Successful logon.	
	2	Click on the Script Tab.	The SmartScript View on the Script Tab is visible. "Choose SmartScript" box is open containing a list of scripts.	
	3	Click on the "Greeting" script and click OK.	The Greeting script is open. The left side of the screen has a list of questions in the script. On the right, the first question of the script is displayed. Question 5: Good [Time of Day]! Thank you for calling the Office of the Ombudsman. My name is XXXX YYYY. Is this your first time calling our office?	
	4	Hit F2 to view the picklist and click on the correct answer. Hit Enter.	Question 9: [NOTE: Press Enter.]	
	5	Hit Enter.	Question 10: *I'm glad you called. How may I help you today? [NOTE: Type caller's problem.]	
	6	Enter the Original Issue Summary. Hit Enter.	Question 11: *[NOTE: Select Issue Category.]	
	7	Hit F2 to view the picklist and click on the correct answer for the Original Issue Category. Hit Enter.	Question 12: *[NOTE: Select Issue Sub Category.]	

Opening a New Case for a New Customer – Not Able to Resolve the Issue

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	8	Hit F2 to view the picklist and click on the correct answer for the Original Issue Sub-Category. Hit Enter twice.	Question 13: [NOTE: Review the summary of the problem with the caller. Verify that the Issue Category and Sub Category are correct.] Let me make sure I understand the outcome you expect. [NOTE: Describe customer expectation.]	
	9	Enter the Customer Expectation Summary. Hit Enter.	Question 14: [NOTE: Select Expectation Category.]	
	10	Hit F2 to view the picklist and click on the correct answer. Hit Enter.	Question 15: [NOTE: Select Expectation Sub Category.]	
	11	Hit F2 to view the picklist and click on the correct answer. Hit Enter.	Question 16: *How did you hear about our office?	
	12	Hit F2 to view the picklist and click on the correct answer. Hit Enter twice.	Question 17: *[NOTE: The following questions are about the borrower. If the caller is a third party, use his / her instead of your.] Now I need to gather some profile information about you (the borrower). May I have your social security number please?	
	13	Enter the SSN (including dashes) and press Enter.	Question 18: *May I have your first name?	
	14	Enter the borrower's first name. Hit Enter.	Question 19: *May I have your last name?	
	15	Enter the borrower's last name. Hit Enter.	Question 20: [NOTE: Select Jr., Sr., III, etc.]	
	16	Hit F2 to view the picklist and click on the correct answer. Hit Enter.	Question 21: What is your middle name or initial?	
	17	Enter the data and hit Enter.	Question 22: [NOTE: Select name prefix.]	

Opening a New Case for a New Customer – Not Able to Resolve the Issue

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	18	Hit F2 to view the picklist and click on the correct answer. Hit Enter.	Question 23: Do you have a preferred name or nickname?	
	19	Enter the data and hit Enter.	Question 24: May I have your birthdate? [NOTE: mm/dd/yyyy]	
	20	Enter the data and hit Enter.	Question 25: What is your street address?	
	21	Enter the data and hit Enter.	Question 26: City?	
	22	Enter the data and hit Enter.	Question 27: State?	
	23	Hit F2 to view the picklist and click on the correct answer. Hit Enter.	Question 28: Zipcode?	
	24	Enter the data and hit Enter.	Question 29: [NOTE: Select country.] Answer defaults to “USA.”	
	25	Hit Enter.	Question 30: *What is the best way for our office to contact you?	
	26	Hit F2 to view the picklist and click on the correct answer. Hit Enter.	Question 31: Home phone number?	
	27	Enter the data and hit Enter.	Question 32: Work phone number?	
	28	Enter the data and hit Enter.	Question 33: Fax number?	
	29	Enter the data and hit Enter.	Question 34: Mobile Phone number?	
	30	Enter the data and hit Enter.	Question 35: [NOTE: Enter country code.] Answer defaults to “001.”	
	31	Enter the data and hit Enter.	Question 36: Email address?	
	32	Enter the data and hit Enter.	Question 37: Secondary email address?	
	33	Enter the data and hit Enter.	Question 38: What is the best time of day to contact you?	
	34	Enter the data and hit Enter.	Question 39: [NOTE: Select time zone. Confirm with caller.]	
	35	Hit F2 to view the picklist and click on the correct answer. Hit Enter.	Question 40: OK, I'd like to get a little more information on your loan please.	

Opening a New Case for a New Customer – Not Able to Resolve the Issue

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	36	Hit Enter.	Question 41: *What type of loan do you have?	
	37	Hit F2 to view the picklist and click on the correct answer. Hit Enter twice.	Question 42: *Who holds your loan?	
	38	Hit F2 to view the picklist and click on the correct answer. Hit Enter.	Question 43: *What is the current status of your loan? [Note: If this is a consolidation loan, discuss with the borrower whether the issue happened before or after disbursement. Then, select either Not Disbursed, Problem After Disbursement, Problem Prior to Disbursement, or Unknown from the picklist.]	
	39	Hit F2 to view the picklist and click on the correct answer. Hit Enter.	Question 44: Hold for a moment while I search for further information on [Area] in the database.	
	40	Hit Enter.	Question 45: [ExistText] [Explanation].	
	41	Hit Enter.	Question 46: [ExistText] [Discuss]	
	42	Hit Enter.	Question 47: *[NOTE: Are you speaking with the borrower?] Answer defaults to "Yes."	
	43	Hit Enter.	Question 49: *[NOTE: Can you resolve the issue now?] Answer defaults to "No."	

Opening a New Case for a New Customer – Not Able to Resolve the Issue

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	44	Hit Enter.	Question 53: Now that I have taken all of your profile information, your case will be assigned to an Ombudsman Specialist. In a moment, I will provide you with a case number for your reference. An Ombudsman Specialist will be contacting you. Thank you for calling. [NOTE: Press Enter twice to end the script and provide caller with case number.]	
	45	Hit Enter twice.	Script View is blank except for case # in top left corner.	
	46	Click on the Accounts tab.	The Account Screen, All Accounts View is visible. All accounts are listed at the top with the highlighted account details displayed in the form applet at the bottom.	
	47	Query on the Account field for the account you just created.	The account just created should be displayed in both applets.	
	48	Click on the Cases View on the view bar.	The Accounts Screen, Cases view is displayed with account details in the form applet at the top with the case just created listed in the bottom.	
	49	Click on the hyperlink under the Contact Last Name.	The Contacts Screen, Cases View is displayed with contact details in the form applet at the top and the case listed at the bottom.	
	50	Click on the hyperlink under the Case # at the bottom of the screen.	The Cases Screen, Activities View is visible. The case data is detailed in a form applet at the top while the activities list applet at the bottom is blank.	

Opening a New Case for a New Customer – Not Able to Resolve the Issue

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	51	Verify all the case information is correct.	The data entered through the Intake script is visible.	

Opening a New Case for a New Customer – Able to Resolve the Issue

Procedures/Script:

Scenario 2: Opening a New Case for a New Customer – Able to Resolve the Issue

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	1	Logon to OCTS 2.0 using proper ID and password.	Successful logon.	
	2	Click on the Script Tab.	The SmartScript View on the Script Tab is visible. “Choose SmartScript” box is open containing a list of scripts.	
	3	Click on the “Greeting” script and click OK.	The Greeting script is open. The left side of the screen has a list of questions in the script. On the right, the first question of the script is displayed. Question 5: Good [Time of Day]! Thank you for calling the Office of the Ombudsman. My name is XXXX YYYY. Is this your first time calling our office?	
	4	Hit F2 to view the picklist and click on the correct answer. Hit Enter.	Question 9: [NOTE: Press Enter.]	
	5	Hit Enter.	Question 10: *I'm glad you called. How may I help you today? [NOTE: Type caller's problem.]	
	6	Enter the Original Issue Summary. Hit Enter.	Question 11: *[NOTE: Select Issue Category.]	
	7	Hit F2 to view the picklist and click on the correct answer for the Original Issue Category. Hit Enter.	Question 12: *[NOTE: Select Issue Sub Category.]	

Opening a New Case for a New Customer – Able to Resolve the Issue

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	8	Hit F2 to view the picklist and click on the correct answer for the Original Issue Sub-Category. Hit Enter twice.	Question 13: [NOTE: Review the summary of the problem with the caller. Verify that the Issue Category and Sub Category are correct.] Let me make sure I understand the outcome you expect. [NOTE: Describe customer expectation.]	
	9	Enter the Customer Expectation Summary. Hit Enter.	Question 14: [NOTE: Select Expectation Category.]	
	10	Hit F2 to view the picklist and click on the correct answer. Hit Enter.	Question 15: [NOTE: Select Expectation Sub Category.]	
	11	Hit F2 to view the picklist and click on the correct answer. Hit Enter twice.	Question 16: *How did you hear about our office?	
	12	Hit F2 to view the picklist and click on the correct answer. Hit Enter.	Question 17: *[NOTE: The following questions are about the borrower. If the caller is a third party, use his/her instead of your.] Now I need to gather some profile information about you (the borrower). May I have your social security number please?	
	13	Enter the SSN (including dashes) and press Enter.	Question 18: *May I have your first name?	
	14	Enter the borrower's first name. Hit Enter.	Question 19: *May I have your last name?	
	15	Enter the borrower's last name. Hit Enter.	Question 20: [NOTE: Select Jr., Sr., III, etc.]	
	16	Hit F2 to view the picklist and click on the correct answer. Hit Enter.	Question 21: What is your middle name or initial?	
	17	Enter the data and hit Enter.	Question 22: [NOTE: Select name prefix.]	

Opening a New Case for a New Customer – Able to Resolve the Issue

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	18	Hit F2 to view the picklist and click on the correct answer. Hit Enter twice.	Question 23: Do you have a preferred name or nickname?	
	19	Enter the data and hit Enter.	Question 24: May I have your birthdate? [NOTE: mm / dd / yyyy]	
	20	Enter the data and hit Enter.	Question 25: What is your street address?	
	21	Enter the data and hit Enter.	Question 26: City?	
	22	Enter the data and hit Enter.	Question 27: State?	
	23	Hit F2 to view the picklist and click on the correct answer. Hit Enter.	Question 28: Zipcode?	
	24	Enter the data and hit Enter.	Question 29: [NOTE: Select country.] Answer defaults to "USA."	
	25	Hit Enter.	Question 30: *What is the best way for our office to contact you?	
	26	Hit F2 to view the picklist and click on the correct answer. Hit Enter.	Question 31: Home phone number?	
	27	Enter the data and hit Enter.	Question 32: Work phone number?	
	28	Enter the data and hit Enter.	Question 33: Fax number?	
	29	Enter the data and hit Enter.	Question 34: Mobile phone number?	
	30	Enter the data and hit Enter.	Question 35: [NOTE: Enter country code.] Answer defaults to "001."	
	31	Enter the data and hit Enter.	Question 36: Email address?	
	32	Enter the data and hit Enter.	Question 37: Secondary email address?	
	33	Enter the data and hit Enter.	Question 38: What is the best time of day to contact you?	
	34	Enter the data and hit Enter.	Question 39: [NOTE: Select time zone. Confirm with caller.]	
	35	Hit F2 to view the picklist and click on the correct answer. Hit Enter.	Question 40: OK, I'd like to get a little more information on your loan please.	

Opening a New Case for a New Customer – Able to Resolve the Issue

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	36	Hit Enter.	Question 41: *What type of loan do you have?	
	37	Hit F2 to view the picklist and click on the correct answer. Hit Enter twice.	Question 42: *Who holds your loan?	
	38	Hit F2 to view the picklist and click on the correct answer. Hit Enter.	Question 43: *What is the current status of your loan?	
	39	Hit F2 to view the picklist and click on the correct answer. Hit Enter.	Question 44: Hold for a moment while I search for further information on [Area] in the database.	
	40	Hit Enter.	Question 45: [ExistText] [Explanation].	
	41	Hit Enter.	Question 46: [ExistText] [Discuss]	
	42	Hit Enter.	Question 47: *[NOTE: Are you speaking with the borrower?] Answer defaults to "Yes."	
	43	Hit Enter.	Question 49: *[NOTE: Can you resolve the issue now?] Answer defaults to "No."	
	44	Hit F2 to view the picklist and click on the correct answer. Hit Enter.	Question 50: [NOTE: Press Enter twice to end the script. Record the case number located in the dashboard. Go to the Cases Tab, Results Search View and add a result for this case. Then, close the case. NOTE: Data does not need to be entered as this is tested using the screens.	
	45	Hit Enter twice.	Script View is blank except for case # in top left corner.	
	46	Click on the Accounts tab.	The Account Screen, All Accounts View is visible. All accounts are listed at the top with the highlighted account details displayed in the form applet at the bottom.	

Opening a New Case for a New Customer – Able to Resolve the Issue

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	47	Query on the Account field for the account you just created.	The account just created should be displayed in both applets.	
	48	Click on the Cases View on the view bar.	The Accounts Screen, Cases view is displayed with account details in the form applet at the top with the case just created listed in the bottom.	
	49	Click on the hyperlink under the Contact Last Name.	The Contacts Screen, Cases View is displayed with contact details in the form applet at the top and the case listed at the bottom.	
	50	Click on the hyperlink under the Case # at the bottom of the screen.	The Cases Screen, Activities View is visible. The case data is detailed in a form applet at the top while the activities list applet at the bottom is blank.	
	51	Verify all the case information is correct.	The data entered through the Intake script is visible.	

Opening a New Case for a New Customer Based on Information from Third Party Contact

Procedures/Script:

Scenario 3: Opening a New Case for a New Customer Based on Information from Third Party Contact

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	1	Logon to OCTS 2.0 using proper ID and password.	Successful logon.	
	2	Click on the Script Tab.	The SmartScript View on the Script Tab is visible. "Choose SmartScript" box is open containing a list of scripts.	
	3	Click on the "Greeting" script and click OK.	The Greeting script is open. The left side of the screen has a list of questions in the script. On the right, the first question of the script is displayed. Question 5: Good [Time of Day]! Thank you for calling the Office of the Ombudsman. My name is XXXX YYYY. Is this your first time calling our office?	
	4	Hit F2 to view the picklist and click on the correct answer. Hit Enter.	Question 9: [NOTE: Press Enter.]	
	5	Hit Enter.	Question 10: *I'm glad you called. How may I help you today? [NOTE: Type caller's problem.]	
	6	Enter the Original Issue Summary. Hit Enter.	Question 11: *[NOTE: Select Issue Category.]	
	7	Hit F2 to view the picklist and click on the correct answer for the Original Issue Category. Hit Enter.	Question 12: *[NOTE: Select Issue Sub Category.]	

Opening a New Case for a New Customer Based on Information from Third Party Contact

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	8	Hit F2 to view the picklist and click on the correct answer for the Original Issue Sub-Category. Hit Enter twice.	Question 13: [NOTE: Review the summary of the problem with the caller. Verify that the Issue Category and Sub Category are correct.] Let me make sure I understand the outcome you expect. [NOTE: Describe customer expectation.]	
	9	Enter the Customer Expectation Summary. Hit Enter.	Question 14: [NOTE: Select Expectation Category.]	
	10	Hit F2 to view the picklist and click on the correct answer. Hit Enter.	Question 15: [NOTE: Select Expectation Sub Category.]	
	11	Hit F2 to view the picklist and click on the correct answer. Hit Enter twice.	Question 16: *How did you hear about our office?	
	12	Hit F2 to view the picklist and click on the correct answer. Hit Enter.	Question 17: *[NOTE: The following questions are about the borrower. If the caller is a third party, use his/her instead of your.] Now I need to gather some profile information about you (the borrower). May I have your social security number please?	
	13	Enter the SSN (including dashes) and press Enter.	Question 18: *May I have your first name?	
	14	Enter the borrower's first name. Hit Enter.	Question 19: *May I have your last name?	
	15	Enter the borrower's last name. Hit Enter.	Question 20: [NOTE: Select Jr., Sr., III, etc.]	
	16	Hit F2 to view the picklist and click on the correct answer. Hit Enter.	Question 21: What is your middle name or initial?	
	17	Enter the data and hit Enter.	Question 22: [NOTE: Select name prefix.]	

Opening a New Case for a New Customer Based on Information from Third Party Contact

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	18	Hit F2 to view the picklist and click on the correct answer. Hit Enter.	Question 23: Do you have a preferred name or nickname?	
	19	Enter the data and hit Enter.	Question 24: May I have your birthdate? [NOTE: mm / dd / yyyy]	
	20	Enter the data and hit Enter.	Question 25: What is your street address?	
	21	Enter the data and hit Enter.	Question 26: City?	
	22	Enter the data and hit Enter.	Question 27: State?	
	23	Hit F2 to view the picklist and click on the correct answer. Hit Enter twice.	Question 28: Zipcode?	
	24	Enter the data and hit Enter.	Question 29: [NOTE: Select country.] Answer defaults to "USA."	
	25	Hit Enter.	Question 30: *What is the best way for our office to contact you?	
	26	Hit F2 to view the picklist and click on the correct answer. Hit Enter.	Question 31: Home phone number?	
	27	Enter the data and hit Enter.	Question 32: Work phone number?	
	28	Enter the data and hit Enter.	Question 33: Fax number?	
	29	Enter the data and hit Enter.	Question 34: Mobile phone number?	
	30	Enter the data and hit Enter.	Question 35: [NOTE: Enter country code.] Answer defaults to "001."	
	31	Enter the data and hit Enter.	Question 36: Email address?	
	32	Enter the data and hit Enter.	Question 37: Secondary email address?	
	33	Enter the data and hit Enter.	Question 38: What is the best time of day to contact you?	
	34	Enter the data and hit Enter.	Question 39: [NOTE: Select time zone. Confirm with caller.]	
	35	Hit F2 to view the picklist and click on the correct answer. Hit Enter.	Question 40: OK, I'd like to get a little more information on your loan please.	

Opening a New Case for a New Customer Based on Information from Third Party Contact

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	36	Hit Enter.	Question 41: *What type of loan do you have?	
	37	Hit F2 to view the picklist and click on the correct answer. Hit Enter twice.	Question 42: *Who holds your loan?	
	38	Hit F2 to view the picklist and click on the correct answer. Hit Enter twice.	Question 43: *What is the current status of your loan?	
	39	Hit F2 to view the picklist and click on the correct answer. Hit Enter twice.	Question 44: Hold for a moment while I search for further information on [Area] in the database.	
	40	Hit Enter.	Question 45: [ExistText] [Explanation].	
	41	Hit Enter.	Question 46: [ExistText] [Discuss]	
	42	Hit Enter.	Question 47: [NOTE: Are you speaking with the borrower?] Answer defaults to “Yes.”	
	43	Hit F2, click on “No” and hit Enter.	Question 49: [NOTE: Press Enter twice.]	
	44	Hit Enter twice.	Question 50: [NOTE: Press Enter to continue.]	
	45	Hit Enter.	Question 51: *NOTE: Press F2. Using the borrower's SSN *SSN* add the third party contact information.	
	46	Hit F2.	The Pick Contact box is opened.	
	47	In the “Find” field, click the drop down arrow and choose “Account.”	The chosen value is displayed in the appropriate field.	
	48	In the “starting with” field, enter the SSN, including dashes, of the borrower. Hit Enter.	The account will be found, and the Pick Contact box will close. The borrower’s last name will appear in the field.	
	49	Hit F2 to open the Pick Contact box again.	Search for the borrower’s account record again.	
	50	Right click, and choose "Copy Record".	The borrower’s record will be copied to a new record.	

Opening a New Case for a New Customer Based on Information from Third Party Contact

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	51	Enter the third party's last name and first name. Change the value of "Contact Type" to "Third Party." Change the "Relationship / Title" to the appropriate value. Change any other demographic information that differs from the borrower.	The data is stored for the third party contact.	
	52	Verify the third party contact record is highlighted and click the Pick button.	The Pick Contact box is closed. The third party's last name appears in the field.	
	53	Hit Enter.	Question 52: *[NOTE: Can you resolve the issue now?] Answer defaults to "No."	
	54	Hit F2 and click on "Yes." Hit Enter.	Question 53: [NOTE: Press Enter twice to end the script. Record the case number located in the dashboard. Go to the Cases Tab, Results Search View and add a result for this case. Then, close the case.]	
	55	Hit Enter twice.	Script View is blank except for case # in top left corner.	
	56	Click on the Accounts tab.	The Account Screen, All Accounts View is visible. All accounts are listed at the top with the highlighted account details displayed in the form applet at the bottom.	
	57	Query on the Account field for the account you just created.	The account just created should be displayed in both applets.	
	58	Click on the Cases View on the view bar.	The Accounts Screen, Cases view is displayed with account details in the form applet at the top with the case just created listed in the bottom.	

Opening a New Case for a New Customer Based on Information from Third Party Contact

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	59	Click on the hyperlink under the Contact Last Name.	The Contacts Screen, Cases View is displayed with contact details in the form applet at the top and the case listed at the bottom.	
	60	Verify all the third party contact information is correct.	The data entered through the Intake script is visible.	
	61	Click on the hyperlink under the Case # at the bottom of the screen.	The Cases Screen, Activities View is visible. The case data is detailed in a form applet at the top while the activities list applet at the bottom is blank.	
	62	Verify all the case information is correct.	The data entered through the Intake script is visible.	

Status or Demographic Update for Existing Customer with an Existing Case

Procedures/Script:

Scenario 4: Status or Demographic Update for Existing Customer with an Existing Case

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	1	Logon to OCTS 2.0 using proper ID and password.	Successful logon.	
	2	Click on the Script Tab.	The SmartScript View on the Script Tab is visible. “Choose SmartScript” box is open containing a list of scripts.	
	3	Click on the “Greeting” script and click OK.	The Greeting script is open. The left side of the screen has a list of questions in the script. On the right, the first question of the script is displayed. Question 5: Good [Time of day]. Thank you for calling the Office of the Ombudsman. My name is XXXX YYYY. Is this your first time calling our office?	
	4	Hit F2 to view the picklist and click on the correct answer. Hit Enter.	Question 8: *Are you calling about an existing case? Answer defaults to “Yes.”	
	5	Hit Enter.	Question 10: [NOTE: Press Enter twice to end the script. Use the OCTS 2.0 screens to find the case and log an activity.]	
	6	Hit Enter twice.	The script view is blank.	
		End of Test **NOTE**: No data needs to be entered since this is tested using the screens.		

Opening a New Case for an Existing Customer – Borrower Calls

Procedures/Script:

Scenario 5: Opening a New Case for an Existing Customer – Borrower Calls

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	1	Logon to OCTS 2.0 using proper ID and password.	Successful logon.	
	2	Click on the Script Tab.	The SmartScript View on the Script Tab is visible. "Choose SmartScript" box is open containing a list of scripts.	
	3	Click on the "Greeting" script and click OK.	The Greeting script is open. The left side of the screen has a list of questions in the script. On the right, the first question of the script is displayed. Question 5: Good [Time of day]! Thank you for calling the Office of the Ombudsman. My name is xxxx yyyyy. Is this your first time calling our office?	
	4	Hit F2 to view the picklist and click on the correct answer. Hit Enter.	Question 8: *Are you calling about an existing case? Answer defaults to "Yes."	
	5	Hit F2 and click on "No." Hit Enter.	Question 10: [NOTE: Press Enter.]	
	6	Hit Enter.	Question 11: *[NOTE: Are you speaking with the borrower?]	
	7	Hit F2 to view the picklist and click on the correct answer. Hit Enter.	Question 12: *[NOTE: Press F2. Search for the account with the borrower's SSN.] May I have your social security number please?	
	8	Hit F2.	The Pick Contact box is opened. A list of all contacts is displayed.	
	9	In the "Find" field, click the drop down arrow and choose "Account."	The chosen value is displayed in the appropriate field.	

Opening a New Case for an Existing Customer – Borrower Calls

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	10	In the “starting with” field, enter the borrower’s SSN, including the dashes. Hit Enter.	The record is found and the Pick Contact box is closed. The borrower’s last name is automatically populated in the field.	
	11	Hit Enter.	Question 14: [NOTE: You have selected *First Name Last Name* as the borrower. If this is correct, press Enter. If this is incorrect click on the question above and press F2 to reselect.]	
	12	Hit Enter.	Question 17: [NOTE: Press Enter.]	
	13	Hit Enter.	Question 18: *How may I help you today? [NOTE: Type caller's problem.]	
	14	Enter the Original Issue Summary. Hit Enter.	Question 19: *[NOTE: Select Issue Category.]	
	15	Hit F2 to view the picklist and click on the correct answer for the Original Issue Category. Hit Enter.	Question 20: *[NOTE: Select Issue Sub Category.]	
	16	Hit F2 to view the picklist and click on the correct answer for the Original Issue Sub-Category. Hit Enter twice.	Question 21: [NOTE: Review the summary of the problem with the caller. Verify that the Issue Category and Sub Category are correct.] Let me make sure I understand the outcome you expect. [NOTE: Describe customer expectation.]	
	17	Enter the Customer Expectation Summary. Hit Enter.	Question 22: [NOTE: Select Expectation Category.]	
	18	Hit F2 to view the picklist and click on the correct answer for the Customer Expectation Category. Hit Enter.	Question 23: [NOTE: Select Expectation Sub Category.]	

Opening a New Case for an Existing Customer – Borrower Calls

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	19	Hit F2 to view the picklist and click on the correct answer for the Customer Expectation Sub-Category. Hit Enter twice.	Question 24: *How did you hear about our office?	
	20	Hit F2 to view the picklist and click on the correct answer for Referred By. Hit Enter.	Question 25: OK, I'd like to get a little more information on your loan please.	
	21	Hit Enter.	Question 26: *What type of loan do you have?	
	22	Hit F2 to view the picklist and click on the correct answer. Hit Enter twice.	Question 27: *Who holds your loan?	
	23	Hit F2 to view the picklist and click on the correct answer. Hit Enter.	Question 28: *What is the current status of your loan? [Note: If this is a consolidation loan, discuss with the borrower whether the issue happened before or after disbursement. Then, select either Not Disbursed, Problem After Disbursement, Problem Prior to Disbursement, or Unknown from the picklist.]	
	24	Hit F2 to view the picklist and click on the correct answer. Hit Enter.	Question 29: Hold for a moment while I search for further information on [Area] in the database.	
	25	Hit Enter.	Question 27: [ExistText][Explanation].	
	26	Hit Enter.	[ExistText] [Discuss]	
	27	Hit Enter.	Question 30: *[NOTE: Can you resolve the issue now?] Answer defaults to "No."	

Opening a New Case for an Existing Customer – Borrower Calls

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	28	Hit Enter.	Question 33: Now that I've taken all of your profile information, your case will be assigned to an Ombudsman Specialist. In a moment, I will provide you with a case number for your reference. An Ombudsman Specialist will be contacting you. Thank you for calling. [NOTE: Press Enter twice to end the script and provide the caller with case number.]	
	29	Hit Enter twice.	Script View is blank except for case # in top left corner.	
	30	Click on the Accounts tab.	The Account Screen, My Accounts View is visible. The user's accounts are listed at the top with the highlighted account details displayed in the form applet at the bottom.	
	31	Query on the Account field for the account you just updated.	The account just updated should be displayed in both applets.	
	32	Click on the Cases View on the view bar.	The Accounts Screen, Cases view is displayed with account details in the form applet at the top with the case just created listed in the bottom, along with previously created cases.	
	33	Click on the hyperlink under the Case # at the bottom of the screen for the case you just entered.	The Cases Screen, Activities View is visible. The case data is detailed in a form applet at the top while the activities list applet at the bottom is blank.	
	34	Verify all the case information is correct.	The data entered through the Intake script is visible.	

Opening a New Case for an Existing Customer – Third Party Calls

Procedures/Script:

Scenario 6: Opening a New Case for an Existing Customer – Third Party Calls

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	1	Logon to OCTS 2.0 using proper ID and password.	Successful logon.	
	2	Click on the Script Tab.	The SmartScript View on the Script Tab is visible. “Choose SmartScript” box is open containing a list of scripts.	
	3	Click on the “Greeting” script and click OK.	The Greeting script is open. The left side of the screen has a list of questions in the script. On the right, the first question of the script is displayed. Question 5: Good [Time of day]! Thank you for calling the Office of the Ombudsman. My name is xxxx yyyyy. Is this your first time calling our office?	
	4	Hit F2 to view the picklist and click on the correct answer. Hit Enter.	Question 8: *Are you calling about an existing case? Answer defaults to “Yes.”	
	5	Hit F2 and click on “No.” Hit Enter.	Question 10: [NOTE: Press Enter.]	
	6	Hit Enter.	Question 11: *[NOTE: Are you speaking with the borrower?]	
	7	Hit F2 to view the picklist and click on the correct answer. Hit Enter.	Question 13: *[NOTE: Press F2. Search for the account with the borrower's SSN. Then, add the third party as a contact for the case.] May I please have the borrower's social security number?	
	8	Hit F2.	The Pick Contact box is opened. A list of all contacts is displayed.	

Opening a New Case for an Existing Customer – Third Party Calls

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	9	In the "Find" field, click the drop down arrow and choose "Account."	The chosen value is displayed in the appropriate field.	
	10	In the "starting with" field, enter the SSN, including dashes, of the borrower. Hit Enter.	The account will be found, and the Pick Contact box will close. The borrower's last name will appear in the field.	
	11	Hit F2 to open the Pick Contact box again.	Search for the account again to bring up the correct record for the borrower.	
	12	Right click, and choose "Copy Record".	The borrower's record will be copied to a new record.	
	13	Enter the third party's last name and first name. Change the value of "Contact Type" to "Third Party." Change the "Relationship / Title" to the appropriate value. Change any other demographic information that differs from the borrower.	The data is stored for the third party contact.	
	14	Verify the third party contact record is highlighted and click the Pick button.	The Pick Contact box is closed. The third party's last name appears in the field.	
	15	Hit Enter.	Question 15: NOTE: You have selected [First Name Last Name] as the Third Party Contact. If this is correct, press Enter. If this is incorrect, click on the question above and press F2 to reselect.]	
	16	Hit Enter.	Question 17: [NOTE: Press Enter.]	
	17	Hit Enter.	Question 18: *How may I help you today? [NOTE: Type caller's problem.]	
	18	Enter the Original Issue Summary. Hit Enter.	Question 19: *[NOTE: Select Issue Category.]	

Opening a New Case for an Existing Customer – Third Party Calls

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	19	Hit F2 to view the picklist and click on the correct answer for the Original Issue Category. Hit Enter.	Question 20: *[NOTE: Select Issue Sub Category.]	
	20	Hit F2 to view the picklist and click on the correct answer for the Original Issue Sub-Category. Hit Enter twice.	Question 21: [NOTE: Review the summary of the problem with the caller. Verify that the Issue Category and Sub Category are correct.] Let me make sure I understand the outcome you expect. [NOTE: Describe customer expectation.]	
	21	Enter the Customer Expectation Summary. Hit Enter.	Question 22: [NOTE: Select Expectation Category.]	
	22	Hit F2 to view the picklist and click on the correct answer for the Customer Expectation Category. Hit Enter.	Question 23: [NOTE: Select Expectation Sub Category.]	
	23	Hit F2 to view the picklist and click on the correct answer for the Customer Expectation Sub-Category. Hit Enter twice.	Question 24: *How did you hear about our office?	
	24	Hit F2 to view the picklist and click on the correct answer for Referred By. Hit Enter.	Question 22: OK, I'd like to get a little more information on your loan please.	
	25	Hit Enter.	Question 23: *What type of loan do you have?	
	26	Hit F2 to view the picklist and click on the correct answer. Hit Enter twice.	Question 24: *Who holds your loan?	

Opening a New Case for an Existing Customer – Third Party Calls

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	27	Hit F2 to view the picklist and click on the correct answer. Hit Enter.	Question 25: *What is the current status of your loan? [Note: If this is a consolidation loan, discuss with the borrower whether the issue happened before or after disbursement. Then, select either Not Disbursed, Problem After Disbursement, Problem Prior to Disbursement, or Unknown from the picklist.]	
	28	Hit F2 to view the picklist and click on the correct answer. Hit Enter.	Question 26: Hold for a moment while I search for further information on [Area] in the database.	
	29	Hit Enter.	Question 27: [ExistText][Explanation].	
	30	Hit Enter.	[ExistText] [Discuss]	
	31	Hit Enter.	Question 30: [NOTE: Can you resolve the issue now?] Answer defaults to “No.”	
	32	Hit Enter.	Question 33: Now that I've taken all of your profile information, your case will be assigned to an Ombudsman Specialist. In a moment, I will provide you with a case number for your reference. An Ombudsman Specialist will be contacting you. Thank you for calling. [NOTE: Press Enter twice to end the script and provide the caller with case number.]	
	33	Hit Enter twice.	Script View is blank.	

Opening a New Case for an Existing Customer – Third Party Calls

INIT	STEP	ACTION / INPUT	EXPECTED RESULT	ACTUAL MEETS EXPECTED RESULT
	34	Click on the Accounts tab.	The Account Screen, My Accounts View is visible. The user's accounts are listed at the top with the highlighted account details displayed in the form applet at the bottom.	
	35	Query on the Account field for the account you just updated.	The account just updated should be displayed in both applets.	
	36	Click on the Cases View on the view bar.	The Accounts Screen, Cases view is displayed with account details in the form applet at the top with the case just created listed in the bottom.	
	37	Click on the hyperlink under the Case # at the bottom of the screen.	The Cases Screen, Activities View is visible. The case data is detailed in a form applet at the top while the activities list applet at the bottom is blank.	
	38	Verify all the case information is correct.	The data entered through the Intake script is visible.	